

**COVER SHEET FOR AMENDMENT OF
POST-TRAVEL SUBMISSION**

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Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Caleb Orr

Employing Office/Committee: Rubio

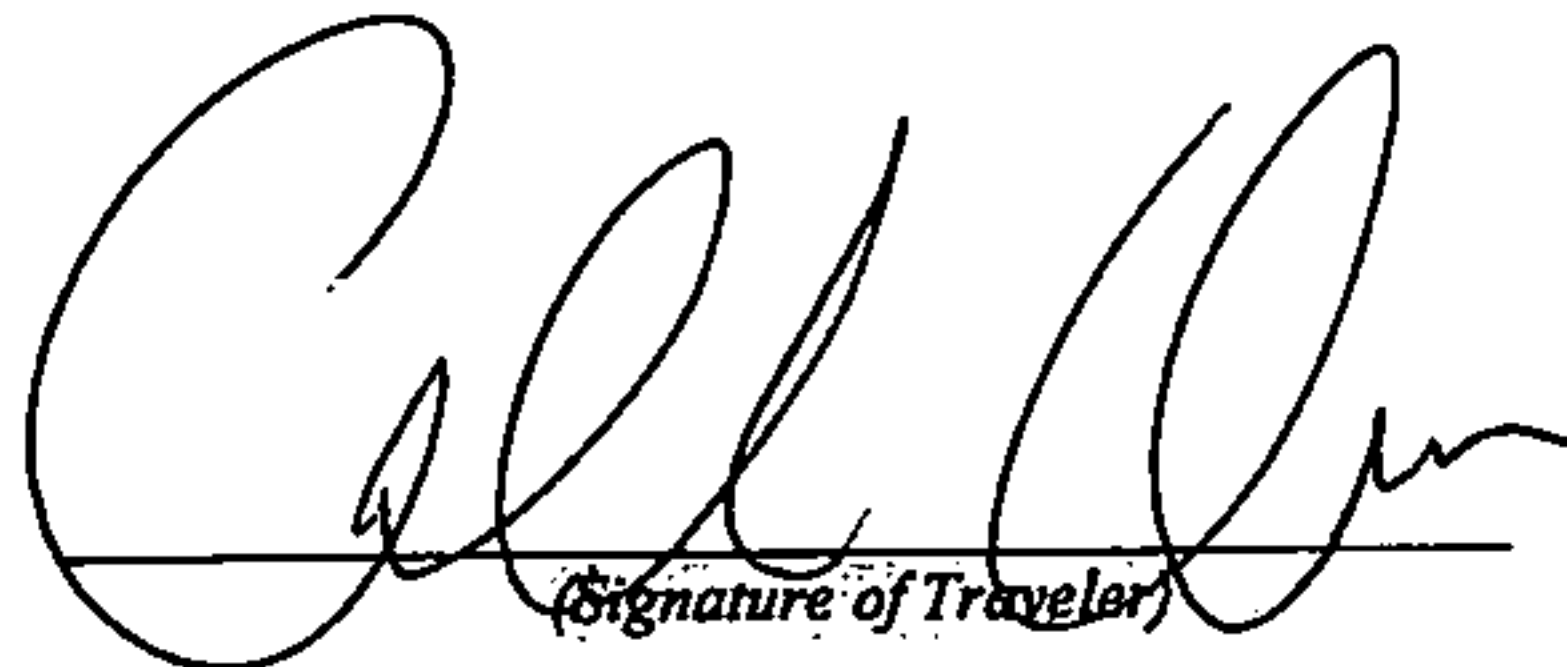
Private Sponsor(s) (List all): The Heritage Foundation

Travel Date(s): April 20-21, 2017

Description/Title of Attached Forms: RE-1 (final version); PSTCF (final version); Copy of trip invitation

Purpose of Amendment (describe the reason for amending original submission): Post-travel submission
must be amended with the Office of Public Records in SH-232.

6/21/17
(Date)


(Signature of Traveler)

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Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

MAR 20 PM 5:43

CALEB ORR

Name of Traveler: _____

SENATOR MARCO RUBIO

Employing Office/Committee: _____

Private Sponsor(s) (list all): THE HERITAGE FOUNDATION

Travel date(s): THURSDAY, APRIL 20 - FRIDAY, APRIL 21, 2017

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): THE INN AT PERRY CABIN, ST. MICHAEL'S, MARYLAND

Explain how this trip is specifically connected to the traveler's official or representational duties:

I handle a number of economic policy issues for Senator Rubio. The trip will help inform my work on economic policy through collaboration with other staffers working on similar issues and access to experts with experience passing legislation through Congress. It will also, through legislative practice exercises, train my procedural awareness in order to help me be a more effective staffer.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

3/20/17
(Date)

Caleb W. Orr
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

MARCO RUBIO

CALEB ORR

I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

3/20/17
(Date)

Mr. Orr
(Signature of Supervising Senator/Officer)

Invitation



The Feulner and Weyrich Fellowship Retreat
Thursday, April 20 – Friday, April 21, 2017
The Inn at Perry Cabin
St. Michaels, Maryland

The purpose of this trip is to provide Feulner and Weyrich Fellows with the opportunity to learn about the structure of government as the Founders intended, review the current authority of the other branches of government, discuss what this means for the legislative branch and conservative ideals.

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation
2. Description of the trip: Two day educational program that is part of a larger educational fellowship.
3. Dates of travel: Thursday, April 20 - Friday, April 21, 2017
4. Place of travel: St Michaels, MD
5. Name and title of Senate invitees: Please see attached list.
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Heritage Foundation has planned and will host the event. Heritage's interest in hosting the event, per our mission below, is to provide a forum for discussing public policy issues.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation is a research and educational institution whose mission is to formulate and promote conservative public policies. We are hosting this retreat to further educate the attendees on our policy research as part of a larger educational fellowship program.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Heritage routinely provides seminars and conferences for members and the public to learn from both elected officials and experts in respective fields. Members and staff participate in these events to educate the public on the conservative movement.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Heritage provides daily seminars at our headquarters for the public to discuss ways to further our mission.

Heritage has staff throughout the country to meet with citizens regarding issues that are being debated in government or are currently laws.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$80	\$120	\$128 (\$64 each day)	\$50 for materials (Pens, notebook, books on subject matter, notepads, coffee)

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

b) the trip involves an event organized specifically with regard to congressional participation

18. Reason for selecting the location of the event or trip

Heritage limited the search for an appropriate venue for our program within a two-hour drive of Washington, DC.

19. Name and location of hotel or other lodging facility:

Inn at Perry Cabin, St. Michaels, MD

20. Reason(s) for selecting hotel or other lodging facility:

The venue provided a secluded location outside of Washington, DC, with the necessary meeting space to host our program.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The lodging, food and beverage are all within the per diem level.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

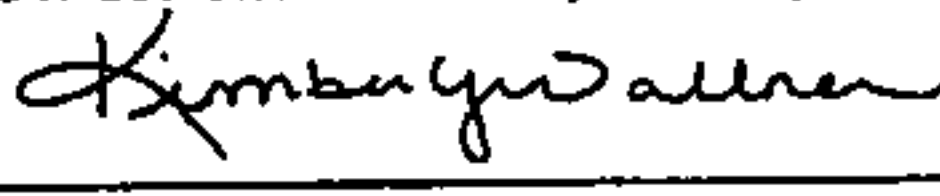
Bus transportation will be chartered.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

n/a

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: 

Name and Title: Kimberly Wallner, Vice President, Policy Outreach and Services

Name of Organization: The Heritage Foundation

Address: 214 Massachusetts Avenue, NE Washington, DC 20002

Telephone Number: 202-548-6820

Fax Number:

E-mail Address: kimberly.wallner@heritage.org



The Feulner and Weyrich Fellowship Retreat

Thursday, April 20 – Friday, April 21, 2017
The Inn at Perry Cabin | St. Michaels, Maryland

INVITATION LIST

About the List:

The following individuals were extended an invitation to the Feulner and Weyrich Fellowship and retreat due to their interest in conservative policy.

Senate			
Sean	McLean	Senator Ted Cruz	Commerce Legislative Assistant
Brian	Colas	Senator Tom Cotton	Deputy Legislative Director
Kevin	Kincheloe	Senator James Lankford	Legislative Assistant
Caleb	Orr	Senator Marco Rubio	Legislative Assistant
Aubrey	Vaughan	Senator Rand Paul	Legislative Counsel
Clint	Brown	Senate Steering	Policy Director
Chris	Prandoni	Senator Mike Lee	Legislative Assistant
Brad	Watts	Senate Judiciary Committee	Counsel

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The Feulner and Weyrich Fellowship Retreat

Thursday, April 20 – Friday, April 21, 2017
The Inn at Perry Cabin | St. Michaels, Maryland

THURSDAY, APRIL 20, 2017

9:00 a.m.	<i>Attendees arrive and board bus</i>	<i>The Heritage Foundation</i>
9:30 a.m.	<i>Bus departs to the Inn at Perry Cabin</i>	
11:00 a.m.	<i>Bus arrives at the Inn at Perry Cabin</i>	

11:00 – 12:00 p.m.	REGISTRATION <i>Attendees check-in to overnight rooms</i>	<i>Front Lobby</i>
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12:00 – 1:15 p.m.	WORKING LUNCHEON	<i>Commodore Room</i>
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THE POWER OF THE PRESIDENCY: IMPLICATIONS FOR THE 45TH PRESIDENCY

David Azerrad
*Director, B. Kenneth Simon Center for Principles and
Politics and AWC Family Foundation Fellow,
The Heritage Foundation*

1:15 – 1:30 p.m.	BREAK	
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1:30 – 3:00 p.m.	SESSION I	<i>Commodore Room</i>
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WHAT'S NEXT?

An examination of the Congressional agenda, and the various issues both chambers of the legislature will face this year.

Tommy Binion
*Director, Policy Outreach,
The Heritage Foundation*

WHAT SHOULD BE NEXT?

A provocative discussion about what is missing from the Congressional debate.

Group Discussion

WHAT CAN COME NEXT?

A situational briefing on the procedural posture of the Senate and House as it relates to the conservative agenda.

Rachel Bovard

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*Director, Policy Services,
The Heritage Foundation*

3:00 – 3:15 p.m. **BREAK**

3:15 – 4:15 p.m. **SESSION II**

Commodore Room

**THE DANGERS AND OPPORTUNITIES LURKING IN THE BUREAUCRACY.
IS THERE A DEEP STATE?**

Hans von Spakovsky
*Manager, Election Law Reform Initiative and Senior Legal Fellow,
The Heritage Foundation*

4:15 – 5:45 p.m. **SESSION III**

Commodore Room

POLICY EXAMINATION OF TOPICS TO BE COVERED IN THE 115TH CONGRESS

Justin Bogie
*Senior Policy Analyst in Fiscal Affairs,
The Heritage Foundation*

Nicolas Loris
*Herbert and Joyce Morgan Research Fellow in
Energy and Environmental Policy,
The Heritage Foundation*

Norbert Michel
*Senior Research Fellow, Financial Regulations and
Monetary Policy,
The Heritage Foundation*

** Each of these scholars participated in the 2016 Presidential Transition*

5:45 – 7:00 p.m. **BREAK**

7:00 – 8:30 p.m. **DINNER DISCUSSION**

Fireside Restaurant

KEYNOTE ADDRESS- PROCESS AND POLICY CONCERNS FOR THE 115TH CONGRESS

Ben Domenech (invited)
Founder, The Federalist

FRIDAY, APRIL 21, 2017

8:30 a.m.

Attendees leave room keys and luggage

Admiral Room

at the Heritage luggage check

9:00 – 10:00 a.m.

BREAKFAST SESSION - GROUP EXERCISE PREPARATION

Commodore Room

GROUP EXERCISE BREAKOUTS

Participants will be broken into teams where they will prepare to engage in an exercise that reflects a real life legislative scenario where individuals will play the roles of active lawmakers on a given topic.

10:00 – 10:15 a.m.

BREAK

10:15 – 12:00 p.m.

SESSION III GROUP EXERCISE

Suites 44, 45 & 46

Groups will consist of participants assigned to represent the House of Representatives, the Senate and the White House. Each group will stage a mock negotiation with the other two groups. Ultimately, all 3 groups will have to come to consensus in the context of a legislative scenario that reflects real life pressures and incentives.

12:15 p.m.

Retreat Concludes

12:30 p.m.

Attendees board the bus with their luggage

2:00 p.m.

Bus arrives at The Heritage Foundation

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